

**Expenditure Profiles and
Marketing Responsiveness of
Nonresident Visitor Groups to Montana**

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Introduction

This report examines summer and winter travel group distribution and expenditures in Montana and is intended to provide the reader with an accurate description of travel group spending patterns. Travel groups are categorized by season, by primary reason for trip to Montana, by location of travel party residence, and by primary summer and winter attractions to Montana. The report is broken into five sections with two appendices.

The first section, *Seasonal Distribution of Travel Groups and Expenditures*, provides a description of summer, winter, and shoulder season travelers to Montana. Travel group distribution by season as well as primary reason for trip to Montana are explored, with seasonal expenditures broken down by primary reason for trip.

The second section, *Primary Reason for Trip to Montana*, provides a description of summer and winter travel group spending based on why they visited Montana. Groups primarily in Montana to pass through, for business, for vacation, to visit family and friends, to shop, and for a meeting/convention are described in terms of expenditures, travel group types, and place of residence.

The third section, *Travel Party's Residence*, describes spending patterns of Montana visitor groups which reside in the states and provinces most widely represented by summer and winter travelers. Washington, North Dakota, Idaho, Wyoming, and Minnesota were some of the most highly represented states of residence among summer and winter groups alike. Other common areas of residence for summer visitor groups were California and Colorado, while Alberta was a common place of residence for winter visitor groups.

The fourth section, *Recreation Travel Markets*, outlines three primary activity attractions to Montana. During the summer months, the fishing market (represented by those groups who indicated vacation as one reason for their trip to Montana and fishing as their primary attraction to Montana) accounted for 6 percent of vacationing summer visitor groups to the state¹. During the winter months, the downhill skiing/snowboarding and snowmobiling markets (represented by those groups who indicated vacation as one reason for their trip to Montana and downhill skiing/snowboarding or snowmobiling as their primary attraction to Montana) accounted for 22 percent and 20 percent of vacationing winter visitor groups, respectively².

Finally, the fifth section, *Marketing Response*, provides some clues into which travel group types will most likely respond to marketing and provides suggestions regarding why some groups might not respond.

¹ Parrish, J., N. Nickerson, and K. McMahon. *Nonresident Summer Travelers to Montana: Profiles and Characteristics*. Research Report 51, September 1997. The Institute for Tourism and Recreation Research.

² McMahon, K., K.A. Cheek, and R. Black. *Winter Nonresident Travelers to Montana: Profiles and Characteristics*. Research Report 59, August 1998. The Institute for Tourism and Recreation Research.

The appendices which follow these five sections provide 1) a list of responses to the survey questions where the visitor groups checked "Other, please specify", and 2) copies of the "front-end" intercept questions and survey instruments given to each intercepted visitor group.

This report is a compilation of data gathered in 1993, 1996, 1997, and 1998 (see methodology section for further explanation). The dollar figures were all inflated, using the most current inflation information, so that all dollars are equally presented (in the same year).

For characteristics and other information, consult ITRR's other research reports on the World Wide Web at www.forestry.umt.edu/itr:

- ◆ Research Report 59, *Winter Nonresident Travelers to Montana: Profiles and Characteristics*
- ◆ Research Report 51, *Nonresident Summer Travelers to Montana: Profiles and Characteristics*
- ◆ Research Report 40, *1993 Nonresident Travel to Montana: Characteristics of Visitors, by Season*

Word of Caution!

The reader must be aware that there is overlap among the market segments discussed in this report (for example, snowmobilers may also visit family).

For this reason, *the economic figures presented are not additive between sections.*



Methodology

Study Population

Travel groups to Montana during the shoulder seasons of 1993 (April 1 through May 31, and October 1 through November 30), the summer of 1996 (June 1 through September 30) and the winter of 1997-98 (December 1, 1997, through March 31, 1998) were examined for this study.

The population of travelers was defined as those persons who entered Montana by private vehicle or commercial air carrier during the study period and whose primary residence was not in Montana at the time. Specifically excluded from the study were those persons who entered Montana on a roadway while traveling in a plainly marked commercial vehicle (e.g., scheduled or chartered bus or a semi truck), those travelers who entered Montana by train, and out-of-state college students living in Montana for educational purposes (who were considered residents). Other than these exclusions, the study attempted to assess all types of travel to the state including travel for pleasure, business, passing through, or any other reason.

Study Goals and Objectives

A statewide travel survey was administered during each study period. The goals of this study were:

- 1) To estimate the size of the traveler population.
- 2) To estimate travel group expenditures in the state.
- 3) To describe travel group characteristics including:
 - ◆ purposes of trip.
 - ◆ attractions for pleasure travel.
 - ◆ travel group characteristics and demographics.
 - ◆ locations and length of travel and overnight stays.
 - ◆ amount of expenditures.
 - ◆ recreational activities engaged in by visitors.
 - ◆ types of information used prior to trip.
 - ◆ methods of transportation.
 - ◆ repeat visitors to Montana.
 - ◆ comments of respondents.

Nonresident Visitor Estimation Model

The nonresident visitor estimation model was designed to identify all members of the study population by location and month of entry into the state. For modeling purposes, entry locations included major airports and highway border crossings. Major airports included the seven commercial airports with scheduled passenger flights arriving from outside Montana: Billings, Bozeman, Great Falls, Helena, Kalispell, Missoula, and West Yellowstone. Forty-two roadway locations were considered entry points into the state. The entry points (i.e., interstates, primary highways, secondary highways, and minor roads) were inclusive of all paved roads and most unpaved roads that crossed Montana borders.

The method used to estimate the nonresident travel population was two-fold. First, border crossing counts at all Montana borders/entry points were obtained from secondary sources for each month of the study. These sources included:

- ◆ Helena Regional Airport Monthly Passenger Deboarding Report by Airport.
- ◆ Montana Department of Transportation, Planning and Statistics Bureau, Monthly Comparative Automatic Traffic Recorder Data Report.
- ◆ Montana Department of Highways, Planning and Statistics Bureau, Biannual Traffic By Sections Report.
- ◆ Idaho Transportation Department, Monthly Automatic Traffic Counter Bulletin.
- ◆ Wyoming Department of Transportation, Planning Program, Automatic Traffic Recorder Monthly Summary.
- ◆ North Dakota Department of Transportation, Planning Division, Monthly Automatic Traffic Data.
- ◆ The U.S. Department of Treasury, Customs Service, Monthly Canada-to-U.S. Border Crossing Statistics.

Second, surveyors identified resident-nonresident proportions at entry locations by observing vehicle license plates and questioning boarding air passengers (at Montana airports) using random sampling techniques stratified by location and time period. Proportion counts have been collected during each study period. Travel group sizes were obtained while administering nonresident travel questionnaires to potential respondents.

Survey Methodology and Response Rates

During the study periods, ITRR staff intercepted nonresident highway travel groups at interstate rest areas, gas stations, and Canadian border crossings. Air travel parties were met in Montana airports while waiting for departing flights.

When contacted, preliminary data was collected from the travel groups, including entry location, group size and type, residence, travel method, purpose of trip, first-time visit vs. repeat visit to Montana, anticipated length of stay in Montana, direction of travel, and planned exit. These 'front-end' data were obtained from virtually every party contacted and thus represented a set of data unaffected by survey non-response bias. Next, the groups were asked to accept and complete a diary questionnaire of their visit to Montana and to then return it by mail in a postage-paid envelope that was provided. During the 1993 study period, 11,457 travel groups were contacted. Useable questionnaires were returned by 5,239 groups for a response rate of 46 percent for the study. Only data from travel groups that visited the state during the shoulder months of 1993 are included from this study. During the summer 1996 study period, 12,941 groups were contacted. Useable questionnaires were returned by 5,800 groups for a 45-percent response rate. During the winter 1997-98 study period, 1,838 groups were contacted. Useable questionnaires were returned by 920 groups for a response rate of 50 percent. No follow-up measures (i.e., reminder postcards or replacement questionnaires) were used to increase response rate. Due to the nature of the questionnaire (i.e., diary of events as they occurred) and the nature of the methodology (i.e., no name or address information was collected from visitors), it would have been inappropriate and impossible to mail replacement questionnaires to non-respondents, as is the norm in mail survey methodology. Therefore, these overall response rates are thought to be acceptable for a 'first (and only) mailing'.

Front-end data collected from all nonresidents contacted allowed adjustments of the survey results for non-response bias. Returned surveys were assigned relative weights based on key variables to adjust for discrepancies with the front-end data. In addition, if there were discrepancies in the proportion of the sample who came in at each entry point and the proportion of nonresident traffic at each entry point, the data were weighted (adjusted) to more accurately reflect the nonresident visitor estimation model.

In order for figures in this report to be comparable among seasons, all numbers were inflated to 1998 dollars using the most current inflation information. The summer and shoulder season figures presented in this report assume that 1) group characteristics and spending patterns of visitor groups to the state during the summer have not changed drastically since 1996, and 2) group characteristics and spending patterns of visitor groups to the state during the shoulder seasons have not changed drastically since 1993.

Section 1

Seasonal Distribution of Nonresident Travel Groups and Expenditures

Nonresident visitor groups to Montana are not equally distributed throughout the year, and thus neither are their expenditures. This section examines two phenomena: variations in nonresident *visitation* and in nonresident *expenditures* among the summer, winter, and shoulder seasons categorized by primary reason for trip to Montana.

The first half of this section addresses nonresident *visitation* to Montana over the course of a year. Visitation figures are presented for each season, as well as for each of eight primary reasons for visiting Montana. The rationale for presenting visitation figures by primary reason lies in the marketing aspect of the figures. Without knowing why travel groups visit Montana, it is difficult to generate promotional materials that might attract them here. Additionally, some groups (those visiting family and friends or passing through the state, for example) will likely visit Montana regardless of exposure to promotional materials. Therefore, by categorizing visitation levels by the season and primary reason for visiting the state, tourism promoters are better able to focus their efforts.

The second half of this section addresses nonresident travel group *expenditures* for each season as well as for each of the eight primary reasons for visiting Montana. These figures are also categorized by primary reason for visiting Montana within each season to better illustrate the contribution each group provides to the total nonresident travelers' expenditures in Montana. Because spending patterns and length of stay vary among groups and among seasons, categorizing expenditures in this fashion allows for a more precise examination of nonresident travel groups. For example, while summer travel groups primarily passing through Montana account for 21 percent of summer groups and 13 percent of total annual groups, they only accounted for 7 percent of summer expenditures and 5 percent of annual expenditures.

Some interesting points to note:

- ◆ 49% of summer groups are primarily on vacation, which account for 29% of annual visits.
- ◆ More groups visit family and friends during the shoulder seasons than during the winter.
- ◆ Winter vacationers account for 41% of winter expenditures, but only 6% of annual expenditures.
- ◆ Summer vacationers account for 37% of annual expenditures.
- ◆ Overall, groups just passing through the state represent 26% of annual visitation but only account for 9% of annual expenditures.



Winter Visitors (December, January, February, March)

Primary Reason for Trip to Montana	# of Groups	% of Winter Groups	% of Annual Groups
Vacation/Recreation/Pleasure	124,000	20%	3%
Visit Friends and Relatives	110,000	18%	3%
Business	127,000	21%	3%
Just Passing Through	196,000	32%	5%
Meeting/Convention	8,000	1%	<1%
Shopping	10,000	2%	<1%
Medical	9,000	1%	<1%
Other*	26,000	4%	<1%
All Winter Visitors	610,000	100%	16%



Summer Visitors (June, July, August, September)

Primary Reason for Trip to Montana	# of Groups	% of Summer Groups	% of Annual Groups
Vacation/Recreation/Pleasure	1,091,000	49%	29%
Visit Friends and Relatives	357,000	16%	9%
Business	136,000	6%	4%
Just Passing Through	478,000	21%	13%
Meeting/Convention	40,000	2%	1%
Shopping	36,000	2%	1%
Medical	22,000	1%	1%
Other*	71,000	3%	2%
All Summer Visitor Groups	2,232,000	100%	59%



Shoulder Season Visitors (April - May, October - November)

Primary Reason for Trip to Montana	# of Groups	% of Shoulder Season Groups	% of Annual Groups
Vacation/Recreation/Pleasure	188,000	20%	5%
Visit Friends and Relatives	205,000	22%	5%
Business	106,000	11%	3%
Just Passing Through	325,000	34%	9%
Meeting/Convention	14,000	2%	<1%
Shopping	55,000	6%	1%
Other*/Medical	54,000	6%	1%
All Shoulder Season Visitor Groups	947,000	100%	25%

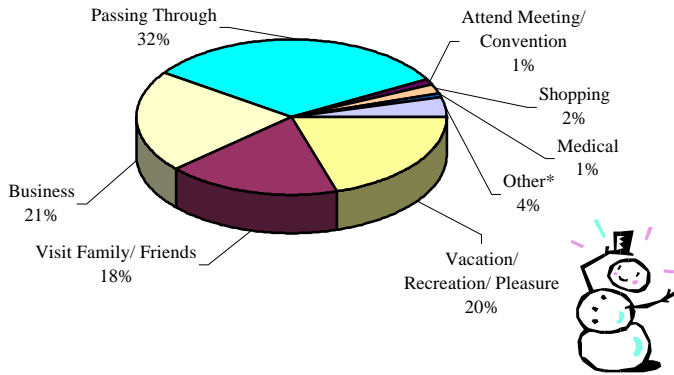


All Visitors

Primary Reason for Trip to Montana	Percent of Total Annual Groups	# of Groups
Vacation/Recreation/Pleasure	37%	1,403,000
Visit Friends and Relatives	18%	672,000
Business	10%	369,000
Just Passing Through	26%	999,000
Meeting/Convention	2%	62,000
Shopping	3%	101,000
Other*/Medical	5%	182,000
All Visitors	100%	3,788,000

Winter Visitor Groups

Percent of **Winter** Visits by Primary Reason for Trip to Montana



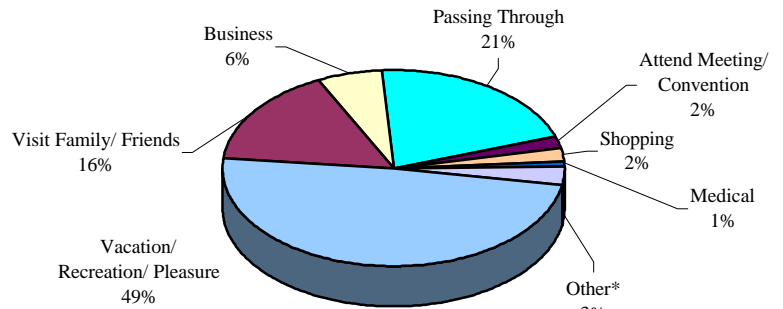
Percent of Travel Groups

Seasonal Breakdown by Primary Reason for Trip to Montana and Percent of Travel Groups by Season



Summer Visitor Groups

Percent of **Summer** Visits by Primary Reason for Trip to Montana

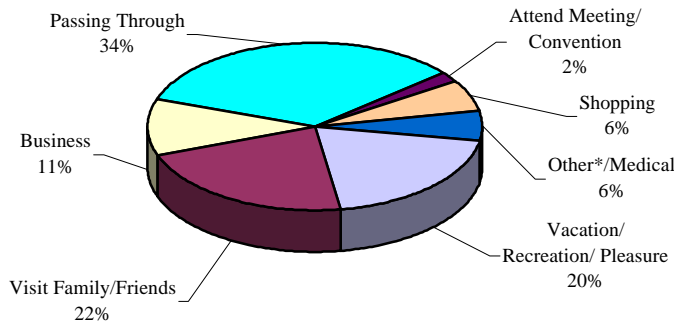


Winter Season = Dec, Jan - March
 Summer Season = June - Sept
 Shoulder Seasons = April - May, Oct - Nov



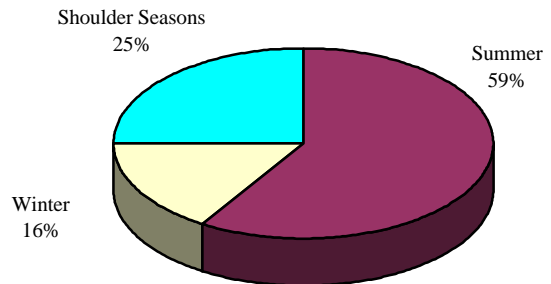
Shoulder Season Groups

Percent of **Shoulder Season** Visits by Primary Reason for Trip to Montana



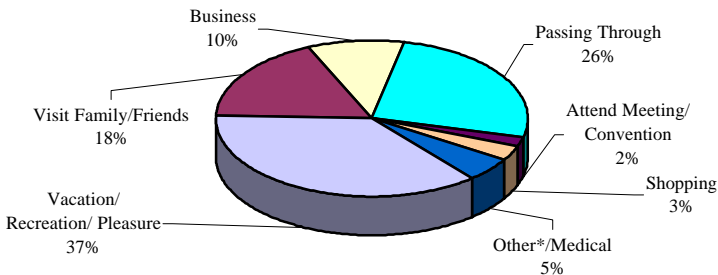
Seasonal Distribution

Percent of Annual Visits by Season of Visit



All Visitor Groups

Percent of **Annual** Visits by Primary Reason for Trip to Montana



* See Appendix A for written responses.



Winter Visitors (December, January, February, March)

Primary Reason for Trip to MT	Length of Stay (days)	Avg Daily Expend.	Total Expend.	% of Winter Expend.	% of Annual Expend.
Vacation/Recreation/Pleasure	5.4	\$146	\$ 98 million	41%	6%
Visit Friends and Relatives	6.1	\$ 68	\$ 46 million	19%	3%
Business	4.4	\$101	\$ 56 million	23%	4%
Just Passing Through	1.9	\$ 64	\$ 23 million	10%	2%
Meeting/Convention	4.2	\$ 99	\$ 3 million	1%	<1%
Shopping	1.4	\$190	\$ 3 million	1%	<1%
Medical	3.1	\$136	\$ 4 million	1%	<1%
Other	6.4	\$ 70	\$ 12 million	5%	1%
All Winter Visitors	4.1	\$ 96	\$240 million	100%	16%



Summer Visitors (June, July, August, September)

Primary Reason for Trip to MT	Length of Stay (days)	Avg Daily Expend.	Total Expend.	% of Summer Expend.	% of Annual Expend.
Vacation/Recreation/Pleasure	4.7	\$108	\$556 million	57%	37%
Visit Friends and Relatives	6.2	\$ 87	\$193 million	20%	13%
Business	5.2	\$ 99	\$ 70 million	7%	5%
Just Passing Through	2.2	\$ 66	\$ 70 million	7%	5%
Meeting/Convention	6.8	\$ 97	\$ 26 million	3%	2%
Shopping	1.4	\$191	\$ 9 million	1%	1%
Medical	2.9	\$128	\$ 8 million	1%	1%
Other	5.1	\$ 98	\$ 36 million	4%	2%
All Summer Visitors	4.5	\$101	\$970 million	100%	64%



Shoulder Season Visitors (April - May, October - November)

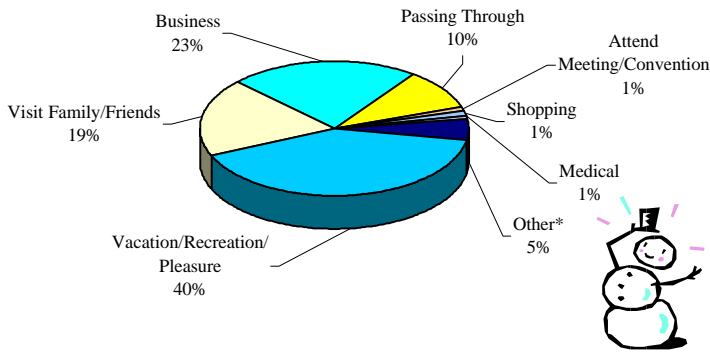
Primary Reason for Trip to MT	Length of Stay (days)	Avg. Daily Expend.	Total Expend.	% of Shoulder Season Expend.	% of Annual Expend.
Vacation/Recreation/Pleasure	4.8	\$ 97	\$ 88 million	29%	6%
Visit Friends and Relatives	6.2	\$ 76	\$ 96 million	32%	6%
Business	4.4	\$ 93	\$ 44 million	15%	3%
Just Passing Through	2.0	\$ 60	\$ 40 million	13%	3%
Meeting/Convention	5.6	\$ 73	\$ 6 million	2%	<1%
Shopping	1.5	\$133	\$ 11 million	4%	1%
Other*/Medical	4.1	\$ 67	\$ 15 million	5%	1%
All Shoulder Season Visitors	3.9	\$ 82	\$300 million	100%	20%



All Visitors

Primary Reason for Trip to Montana	Average Daily Expenditures	Total Expenditures	% of Expenditures
Vacation/Recreation/Pleasure	\$110	\$742 million	49%
Visit Friends and Relatives	\$ 80	\$335 million	22%
Business	\$ 98	\$170 million	11%
Just Passing Through	\$ 64	\$133 million	9%
Meeting/Convention	\$ 92	\$ 35 million	2%
Shopping	\$159	\$ 23 million	2%
Other*/Medical	\$ 90	\$ 75 million	5%
All Visitors	\$ 99	\$1.513 billion	100%

Winter Visitor Groups
 Percent of Winter Expenditures by Travel Group Type

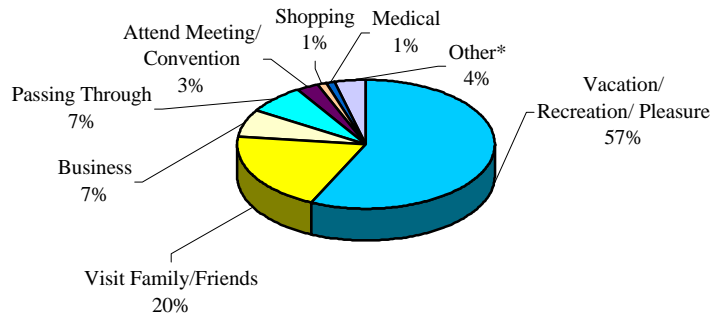


Percent of Expenditures

Seasonal Breakdown by Primary Reason for Trip to Montana and Percent of Expenditures by Season



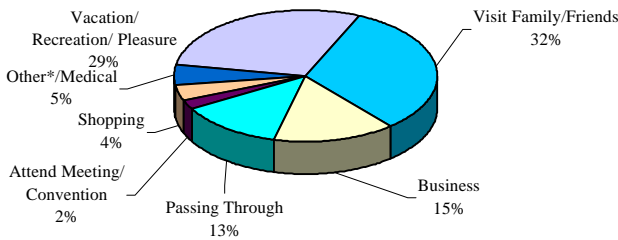
Summer Visitor Groups
 Percent of Summer Expenditures by Travel Group Type



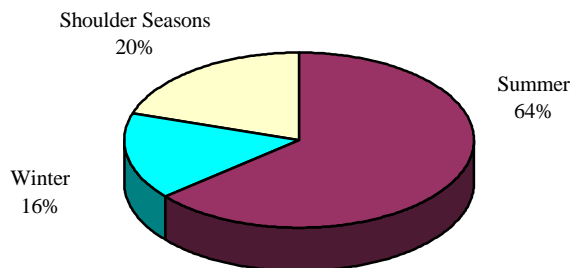
*Winter Season = Dec, Jan - March
 Summer Season = June - Sept
 Shoulder Seasons = April - May, Oct - Nov*



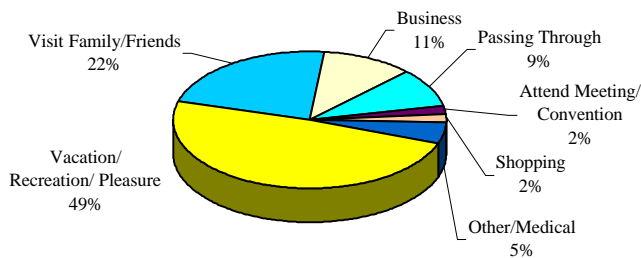
Shoulder Season Groups
 Percent of Shoulder Season Expenditures by Travel Group Type



Seasonal Distribution
 Percent of Annual Expenditures by Season of Visit



All Visitor Groups
 Percent of Annual Expenditures by Travel Group Type



* See Appendix A for written responses.

Section 2

Primary Reason for Trip to Montana

This section examines summer and winter groups categorized by their primary reason for visiting Montana.

Some points of interest:

- ◆ Summer and winter groups primarily passing through Montana accounted for only about one-third as much of the season's total expenditures as they did travel groups.
- ◆ Groups passing through the state spent a far larger portion of their money on gasoline and oil than any other group type.
- ◆ Vacationers represented nearly one-half of all summer travel groups but only 20 percent of all winter groups.
- ◆ Winter vacationers accounted for 41 percent of winter expenditures but represented less than one-half that amount in travel groups.

Summer Nonresident Visitor Groups Primarily Passing Through Montana

Summer nonresident visitor groups primarily passing through Montana represented 21 percent of all summer nonresident groups to the state. They accounted for 7 percent of all summer nonresident expenditures, spent the largest portion of their money on gasoline/oil, and stayed an average of 2.2 days (1 night). Groups passing through the state generally traveled as couples, with family, or alone, and most likely came from Washington, Idaho, or Alberta.

Figure 1.1: Expenditure Distribution of Summer Visitor Groups Primarily Passing Through Montana

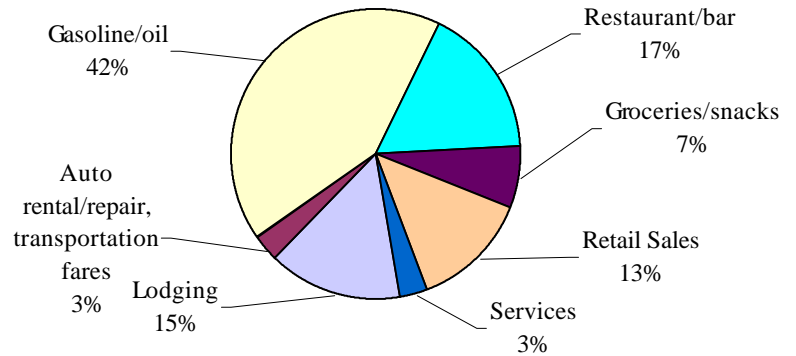


Table 1.1: Expenditures of Summer Groups Primarily Passing Through Montana

Average Expenditures of Summer Visitor Groups Primarily Passing Through Montana					
% of All Summer Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Summer Expenditures
21%	478,000	2.2	\$66	\$70 million	7%

Table 1.2: Most Frequent Group Types of Summer Groups Primarily Passing Through Montana

	Group Type
#1	Couple
#2	Family
#3	Alone

Table 1.3: Most Frequent Places of Residence of Summer Groups Primarily Passing Through Montana

	Residence
#1	Washington
#2	Idaho
#3	California



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Winter Nonresident Visitor Groups Primarily Passing Through Montana

Winter nonresident visitor groups primarily passing through Montana represented 32 percent of all winter nonresident groups to the state. They accounted for 10 percent of all winter nonresident expenditures, spent the largest portion of their money on gasoline/oil, and stayed an average of 1.9 days (1 night). Groups passing through the state generally traveled as couples, alone, or with family, and most likely came from Alberta, Washington, North Dakota, or Idaho.

Figure 1.2: Expenditure Distribution of Winter Visitor Groups Primarily Passing Through Montana

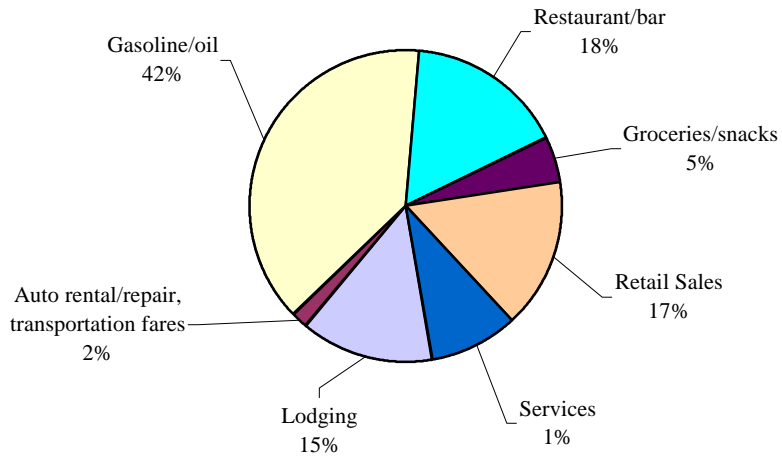


Table 1.4: Expenditures of Winter Groups Passing Through Montana

Average Expenditures of <i>Winter Visitor Groups Primarily Passing Through Montana</i>					
Percent of All Winter Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Winter Expenditures
32%	196,000	1.9	\$64	\$23 million	10%

Table 1.5: Most Frequent Group Types of Winter Groups Primarily Passing Through Montana

	Group Type
#1	Couple
#2	Alone
#3	Family

Table 1.6: Most Frequent Places of Residence of Winter Groups Primarily Passing Through Montana

	Residence
#1	Alberta
#2	Washington North Dakota
#3	Idaho



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Summer Nonresident Visitor Groups Primarily in Montana for Business

Summer nonresident visitor groups primarily in Montana for business represented 6 percent of all summer nonresident groups to the state. They accounted for 7 percent of all summer nonresident expenditures, spent the largest portion of their money on retail sales, and stayed an average of 5.2 days (4 nights). Groups on business generally traveled alone, as couples, or with family and most likely came from Washington, Wyoming, or Colorado.

Figure 1.3: Expenditure Distribution of Summer Visitor Groups Primarily in Montana on Business

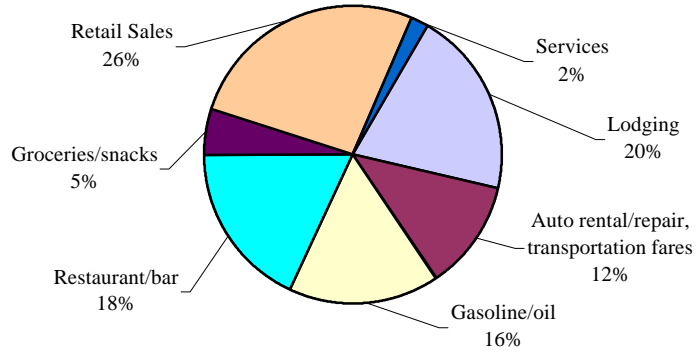


Table 1.7: Expenditures of Summer Groups in Montana on Business

Average Expenditures of <i>Summer Visitor Groups Primarily in Montana for Business</i>					
% of All Summer Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Summer Expenditures
6%	136,000	5.2	\$99	\$70 million	7%

Table 1.8: Most Frequent Group Types of Summer Groups Primarily in Montana for Business

	Group Type
#1	Alone
#2	Couple
#3	Family

Table 1.9: Most Frequent Places of Residence of Summer Groups Primarily in Montana for Business

	Residence
#1	Washington
#2	Wyoming
#3	Colorado



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Winter Nonresident Visitor Groups Primarily in Montana for Business

Winter nonresident visitor groups primarily in Montana for business represented 21 percent of all winter nonresident groups to the state. They accounted for 23 percent of all winter nonresident expenditures, spent the largest portion of their money on restaurant/bar, and stayed an average of 4.4 days (3 nights). Groups on business generally traveled alone, with family, or as couples and most likely came from Washington, North Dakota, or Idaho.

Figure 1.4: Expenditure Distribution of Winter Visitor Groups Primarily in Montana on Business

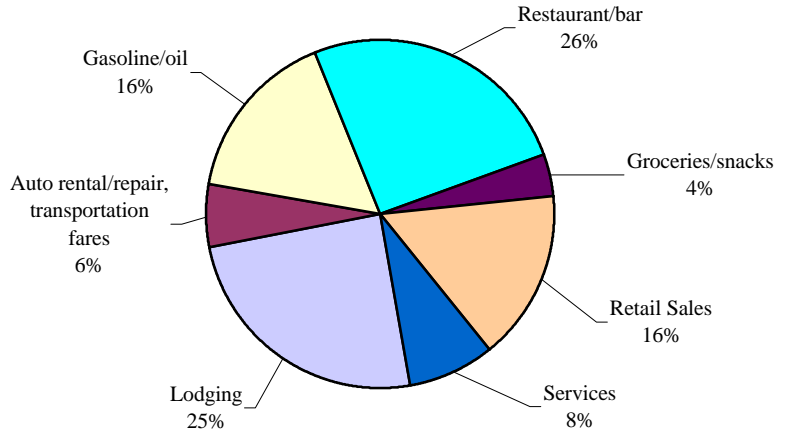


Table 1.10: Expenditures of Winter Groups in Montana on Business

Average Expenditures of Winter Visitor Groups Primarily in Montana for Business					
Percent of All Winter Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Winter Expenditures
21%	127,000	4.4	\$101	\$56 million	23%

Table 1.11: Most Frequent Group Types of Winter Groups Primarily in Montana for Business

	Group Type
#1	Alone
#2	Family
#3	Couple

Table 1.12: Most Frequent Places of Residence of Winter Groups Primarily in Montana for Business

	Residence
#1	Washington
#2	North Dakota
#3	Idaho



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Summer Nonresident Visitor Groups Primarily in Montana for Vacation/Recreation/Pleasure

Summer nonresident visitor groups primarily in Montana for vacation represented 49 percent of all summer nonresident groups to the state. They accounted for 57 percent of all summer nonresident expenditures, spent the largest portion of their money on retail items, and stayed an average of 4.7 days (3 nights). Groups on vacation generally traveled as couples, with family, or with friends, and most likely came from California, Washington, or Alberta.

Figure 1.5: Expenditure Distribution of Summer Visitor Groups Primarily in Montana for Vacation/Recreation/Pleasure

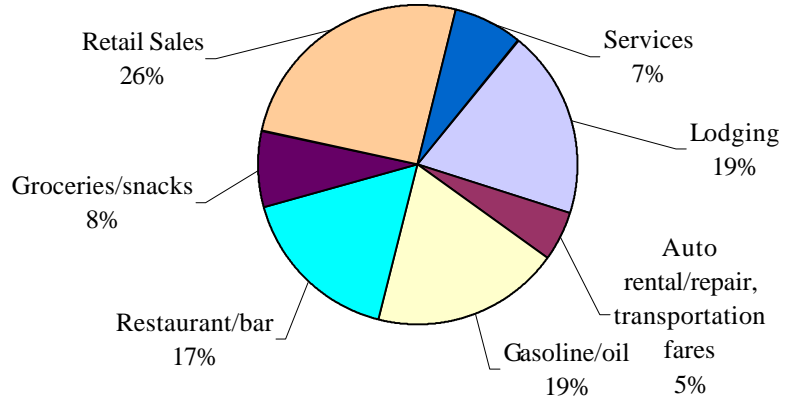


Table 1.13: Expenditures of Summer Groups in Montana for Vacation

Average Expenditures of Summer Visitor Groups Primarily in Montana for Vacation					
% of All Summer Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Summer Expenditures
49%	1 million	4.7	\$108	\$556 million	57%

Table 1.14: Most Frequent Group Types of Summer Groups Primarily in Montana for Vacation

	Group Type
#1	Couple
#2	Family
#3	Friends

Table 1.15: Most Frequent Places of Residence of Summer Groups Primarily in Montana for Vacation

	Residence
#1	California
#2	Washington
#3	Alberta



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Winter Nonresident Visitor Groups Primarily in Montana for Vacation/Recreation/Pleasure

Winter nonresident visitor groups primarily in Montana for vacation represented 20 percent of all winter nonresident groups to the state. They accounted for 41 percent of all winter nonresident expenditures, spent the largest portion of their money on restaurants/bars, and stayed an average of 5.4 days (4 nights). Groups on vacation generally traveled as couples, with family, or with friends, and most likely came from North Dakota, Minnesota, Washington, or Idaho.

Figure 1.6: Expenditure Distribution of Winter Visitor Groups Primarily in Montana for Vacation/Recreation/Pleasure

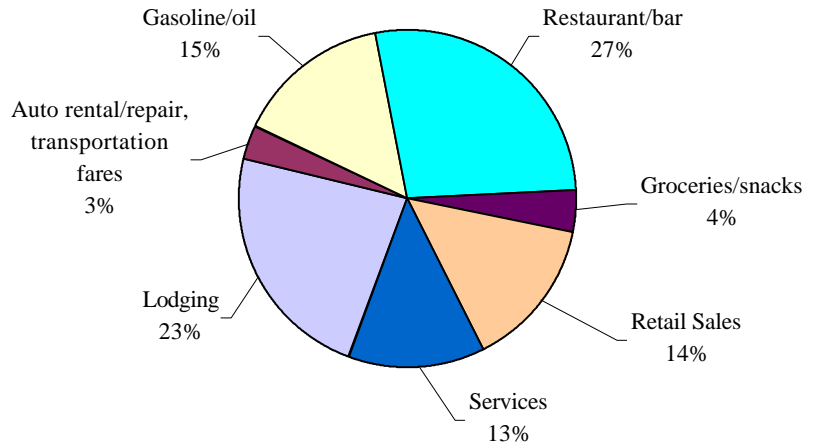


Table 1.16: Expenditures of Winter Groups in Montana for Vacation

Average Expenditures of Winter Visitor Groups Primarily in Montana for Vacation					
Percent of All Winter Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Winter Expenditures
20%	124,000	5.4	\$146	\$99 million	41%

Table 1.17: Most Frequent Group Types of Winter Groups Primarily in Montana for Vacation

	Group Type
#1	Couple
#2	Family
#3	Friends

Table 1.18: Most Frequent Places of Residence of Winter Groups Primarily in Montana for Vacation

	Residence
#1	North Dakota Minnesota
#2	Washington
#3	Idaho



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Summer Nonresident Visitor Groups Primarily in Montana to Visit Family and Friends

Summer nonresident visitor groups primarily in Montana to visit family and friends represented 16 percent of all summer nonresident groups to the state. They accounted for 20 percent of all summer nonresident expenditures, spent the largest portion of their money on retail items, and stayed an average of 6.2 days (5 nights). Groups visiting family and friends generally traveled with family, as couples, or alone, and most likely came from Washington, California, or Oregon.

Figure 1.7: Expenditure Distribution of Summer Visitor Groups Primarily Visiting Family/Friends in Montana

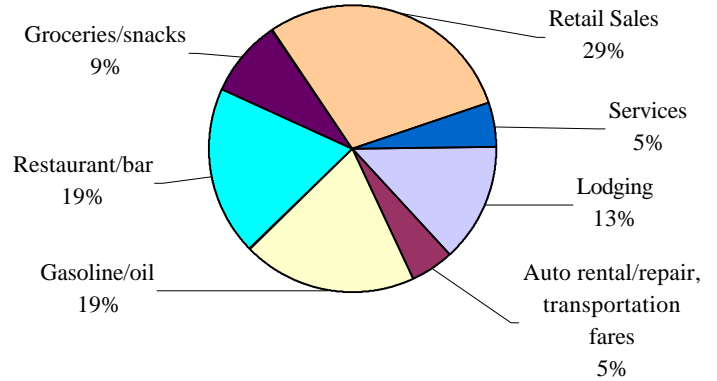


Table 1.19: Expenditures of Summer Groups Primarily in Montana to Visit Family and Friends

Average Expenditures of Summer Visitor Groups Primarily in Montana to Visit Family/Friends					
% of All Summer Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Summer Expenditures
16%	357,000	6.2	\$87	\$193 million	20%

Table 1.20: Most Frequent Group Types of Summer Groups Primarily in Montana to Visit Family and Friends

	Group Type
#1	Family
#2	Couple
#3	Alone

Table 1.21: Most Frequent Places of Residence of Summer Groups Primarily in Montana to Visit Family and Friends

	Residence
#1	Washington
#2	California
#3	Oregon



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Winter Nonresident Visitor Groups Primarily in Montana to Visit Family and Friends

Winter nonresident visitor groups primarily in Montana to visit family and friends represented 18 percent of all winter nonresident groups to the state. They accounted for 19 percent of all winter nonresident expenditures, spent the largest portion of their money on retail items, and stayed an average of 6.1 days (5 nights). Groups visiting family and friends generally traveled alone, as couples, or with family, and most likely came from North Dakota, Washington, Idaho, or Wyoming.

Figure 1.8: Expenditure Distribution of Winter Visitor Groups Primarily Visiting Family/Friends in Montana

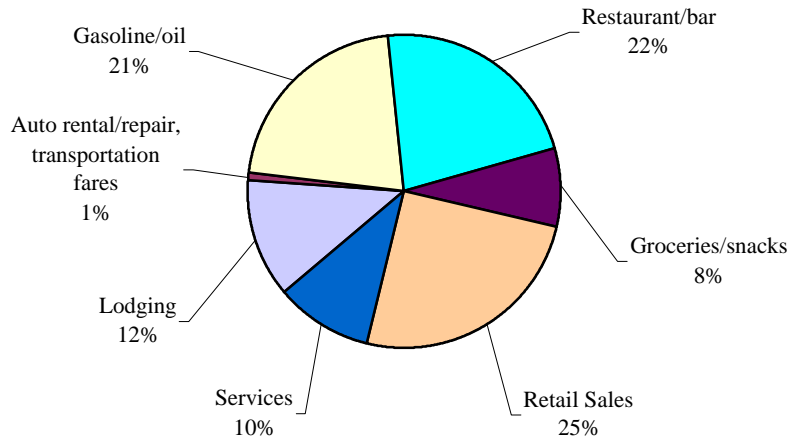


Table 1.22: Expenditures of Winter Groups Primarily in Montana to Visit Family and Friends

Average Expenditures of Winter Visitor Groups Primarily in Montana to Visit Family/Friends					
Percent of All Winter Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Winter Expenditures
18%	111,000	6.1	\$68	\$46 million	19%

Table 1.23: Most Frequent Group Types of Winter Groups Primarily in Montana to Visit Family and Friends

	Group Type
#1	Alone
#2	Couple
#3	Family

Table 1.24: Most Frequent Places of Residence of Winter Groups Primarily in Montana to Visit Family and Friends

	Residence
#1	North Dakota
#2	Washington Idaho
#3	Wyoming



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Summer Nonresident Visitor Groups Primarily in Montana for Shopping

Summer nonresident visitor groups primarily in Montana to shop represented 2 percent of all summer nonresident groups to the state. They accounted for 1 percent of all summer nonresident expenditures, spent the largest portion of their money on retail items, and stayed an average of 1.4 days (0 nights). Groups here to shop generally traveled with family, as couples, or alone, and most likely came from Wyoming, Alberta, or Saskatchewan.

Figure 1.9: Expenditure Distribution of Summer Visitor Groups Primarily in Montana for Shopping

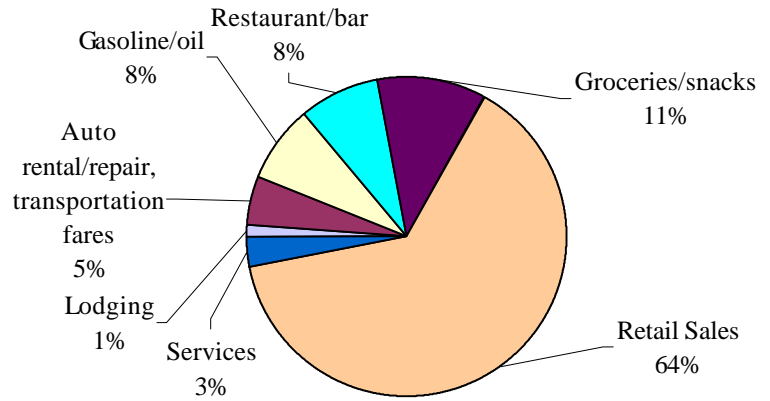


Table 1.25: Expenditures of Summer Groups in Montana for Shopping

Average Expenditures of Summer Visitor Groups Primarily in Montana for Shopping					
% of All Summer Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Summer Expenditures
2%	36,000	1.4	\$191	\$9 million	1%

Table 1.26: Most Frequent Group Types of Summer Groups Primarily in Montana for Shopping

	Group Type
#1	Family
#2	Couple
#3	Alone

Table 1.27: Most Frequent Places of Residence of Summer Groups Primarily in Montana for Shopping

	Residence
#1	Wyoming
#2	Alberta
#3	Saskatchewan



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Winter Nonresident Visitor Groups Primarily in Montana for Shopping

Winter nonresident visitor groups primarily in Montana for shopping represented 2 percent of all winter nonresident groups to the state. They accounted for 1 percent of all winter nonresident expenditures, spent the largest portion of their money on retail items, and stayed an average of 1.4 days (0 nights). Groups in Montana to shop generally traveled as couples, with family, or alone, and most likely came from Wyoming, North Dakota, or British Columbia.

Figure 1.10: Expenditure Distribution of Winter Visitor Groups Primarily in Montana for Shopping

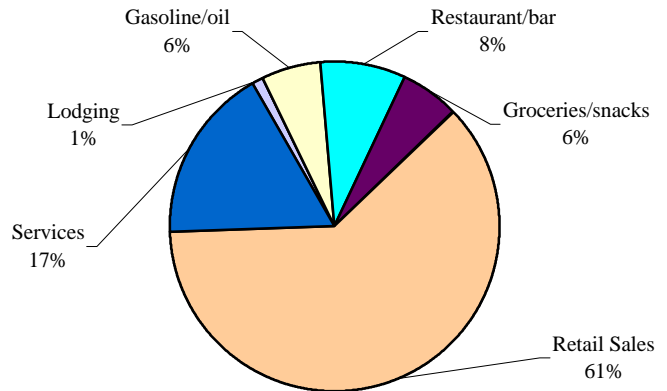


Table 1.28: Expenditures of Winter Groups in Montana for Shopping

Average Expenditures of Winter Visitor Groups Primarily in Montana for Shopping					
Percent of All Winter Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Winter Expenditures
2%	10,000	1.4	\$190	\$3 million	1%

Table 1.29: Most Frequent Group Types of Winter Groups Primarily in Montana for Shopping

	Group Type
#1	Couple
#2	Family
#3	Alone

Table 1.30: Most Frequent Places of Residence of Winter Groups Primarily in Montana for Shopping

	Residence
#1	Wyoming
#2	North Dakota
#3	British Columbia



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Summer Nonresident Visitor Groups Primarily in Montana for a Meeting/Convention

Summer nonresident visitor groups primarily in Montana for a meeting/convention represented 2 percent of all summer nonresident groups to the state. They accounted for 3 percent of all summer nonresident expenditures, spent the largest portion of their money on lodging, and stayed an average of 6.8 days (5 nights). Groups here for meetings/conventions generally traveled alone, as couples, or with family, and most likely came from Oregon, California, or Washington.

Figure 1.11: Expenditure Distribution of Summer Visitor Groups Primarily in Montana for a Meeting/Convention

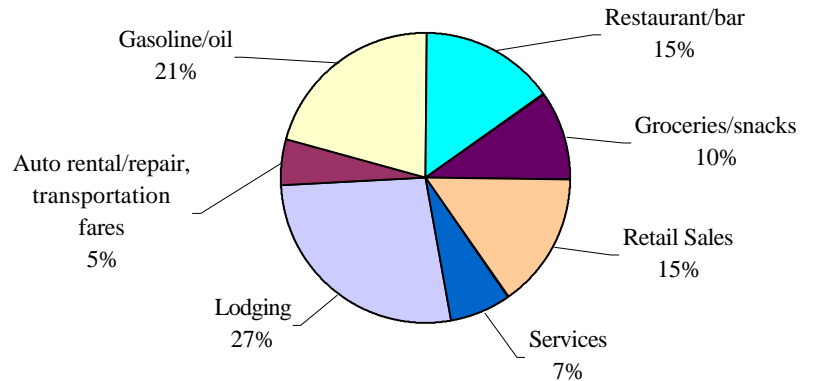


Table 1.31: Expenditures of Summer Groups in Montana for a Meeting/Convention

Average Expenditures of Summer Visitor Groups Primarily in Montana for a Meeting/Convention					
% of All Summer Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Summer Expenditures
2%	40,000	6.8	\$97	\$26 million	3%

Table 1.32: Most Frequent Group Types of Summer Groups Primarily in Montana for a Meeting/Convention

	Group Type
#1	Alone
#2	Couple
#3	Family

Table 1.33: Most Frequent Places of Residence of Summer Groups Primarily in Montana for a Meeting/Convention

	Residence
#1	Oregon
#2	California
#3	Washington



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Winter Nonresident Visitor Groups Primarily in Montana for a Meeting/Convention

Winter nonresident visitor groups primarily in Montana for a meeting/convention represented 1 percent of all winter nonresident groups to the state. They accounted for 1 percent of all winter nonresident expenditures, spent the largest portion of their money on lodging and stayed an average of 4.2 days (3 nights). Groups attending a meeting/convention generally traveled alone, as couples, or with business associates, and most likely came from Idaho, Wyoming, or South Dakota.

Figure 1.12: Expenditure Distribution of Winter Visitor Groups Primarily in Montana to Attend a Meeting/Convention

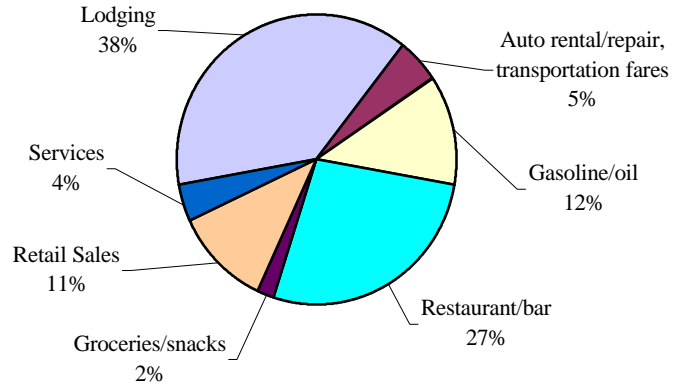


Table 1.34: Expenditures of Winter Groups in Montana for a Meeting/Convention

Average Expenditures of Winter Visitor Groups Primarily in Montana for a Meeting/Convention					
Percent of All Winter Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Winter Expenditures
1%	8,000	4.2	\$99	\$3 million	1%

Table 1.35: Most Frequent Group Types of Winter Groups Primarily in Montana for a Meeting/Convention

	Group Type
#1	Alone
#2	Couple
#3	Business Associates

Table 1.36: Most Frequent Places of Residence of Winter Groups Primarily in Montana for a Meeting/Convention

	Residence
#1	Idaho
#2	Wyoming
#3	South Dakota



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Section 3

Travel Party's Residence

This section examines the summer and winter travel groups from various geographic locations. Nonresident visitor groups commonly traveled from states bordering Montana (Idaho, Wyoming, and North Dakota) as well as Minnesota, Washington, California, Colorado, and Alberta.

Some points of interest:

- ◆ Winter groups from Idaho represented 11 percent of all winter groups and 6 percent of all winter expenditures.
- ◆ North Dakotans were more likely to visit Montana in the winter (83,000 groups) than in the summer (77,000 groups).
- ◆ Winter groups from Alberta accounted for 9 percent of all winter groups but only 2 percent of all winter expenditures.
- ◆ Washington and California summer travel groups together made up 23 percent of all summer expenditures.
- ◆ Groups from Wyoming spent a larger portion of their money on retail sales than any other group type.

Summer Visitor Groups to Montana from Washington

Summer visitor groups in Montana from Washington represented 13 percent of all summer nonresident groups to the state. They accounted for 11 percent of all summer nonresident expenditures, spent the largest portion of their money on gasoline, and stayed an average of 4.1 days (3 nights). Groups from Washington generally traveled as couples, with family, or alone and visited Montana for vacation, to pass through, or to visit family and friends.

Figure 2.1: Expenditure Distribution of Summer Visitor Groups to Montana from Washington

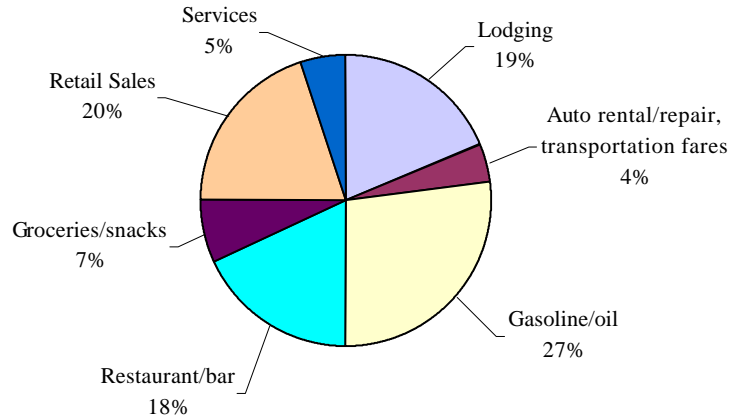


Table 2.1: Expenditures of Summer Groups in Montana from Washington

Average Expenditures of Summer Visitor Groups in Montana from Washington					
% of All Summer Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Summer Expenditures
13%	287,000	4.1	\$86	\$102 million	11%

Table 2.2: Most Frequent Group Types of Summer Groups in Montana from Washington

	Group Type
#1	Couple
#2	Family
#3	Alone

Table 2.3: Most Frequent Primary Reasons for Trip of Summer Groups in Montana from Washington

	Primary Reason for Trip
#1	Vacation/Recreation/Pleasure
#2	Pass Through
#3	Visit Family/Friends



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Winter Visitor Groups to Montana from Washington

Winter visitor groups to Montana from Washington represented 15 percent of all winter nonresident groups to the state. They accounted for 14 percent of all winter nonresident expenditures, spent the largest portion of their money on restaurant/bar, and stayed an average of 4.3 days (3 nights). Groups from Washington generally traveled alone, as couples, or with family, and visited Montana to pass through, for business, or for vacation.

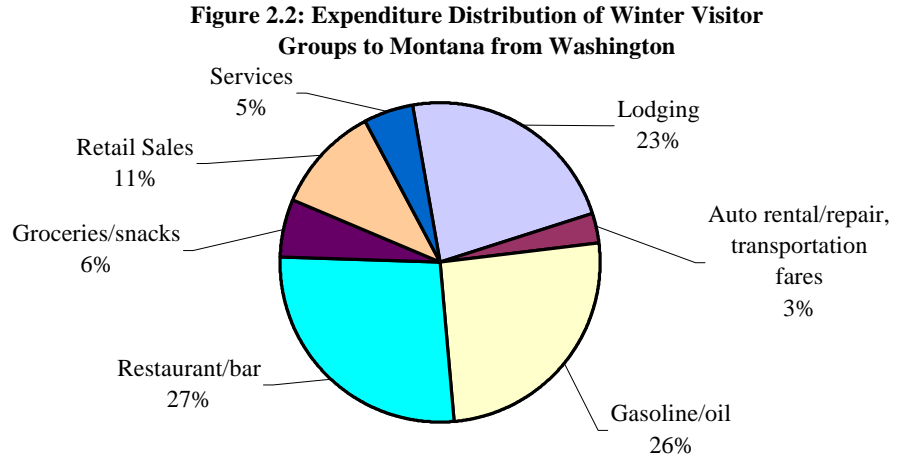


Table 2.4: Expenditures of Winter Groups in Montana from Washington

Average Expenditures of Winter Visitor Groups to Montana from Washington					
Percent of All Winter Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Winter Expenditures
15%	92,000	4.3	\$85	\$33 million	14%

Table 2.5: Most Frequent Group Types of Winter Groups in Montana from Washington

	Group Type
#1	Alone
#2	Couple
#3	Family

Table 2.6: Most Frequent Primary Reasons for Trip of Winter Groups in Montana from Washington

	Primary Reason for Trip
#1	Pass Through
#2	Business
#3	Vacation/Recreation/Pleasure



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Summer Visitor Groups to Montana from Idaho

Summer visitor groups in Montana from Idaho represented 6 percent of all summer nonresident groups to the state. They accounted for 4 percent of all summer nonresident expenditures, spent the largest portion of their money on gasoline/oil, and stayed an average of 3 days (2 nights). Groups from Idaho generally traveled with family, as couples, or alone, and visited Montana for vacation, to pass through, or to visit family and friends.

Figure 2.3: Expenditure Distribution of Summer Visitor Groups to Montana from Idaho

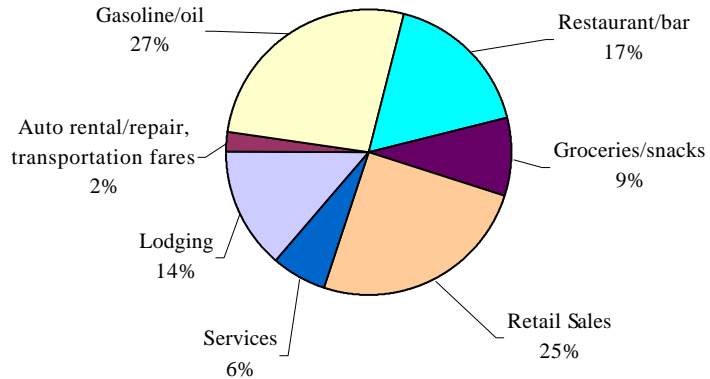


Table 2.7: Expenditures of Summer Groups in Montana from Idaho

Average Expenditures of Summer Visitor Groups in Montana from Idaho					
% of All Summer Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Summer Expenditures
6%	133,000	3.0	\$85	\$34 million	4%

Table 2.8: Most Frequent Group Types of Summer Groups in Montana from Idaho

	Group Type
#1	Family
#2	Couple
#3	Alone

Table 2.9: Most Frequent Primary Reasons for Trip of Summer Groups in Montana from Idaho

	Primary Reason for Trip
#1	Vacation/Recreation/Pleasure
#2	Pass Through
#3	Visit Family/Friends



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Winter Visitor Groups to Montana from Idaho

Winter visitor groups to Montana from Idaho represented 11 percent of all winter nonresident groups to the state. They accounted for 6 percent of all winter nonresident expenditures, spent the largest portion of their money on gasoline/oil, and stayed an average of 3.3 days (2 nights). Groups from Idaho generally traveled alone, as couples, or with family, and visited Montana for business, vacation, or to visit family and friends.

Figure 2.4: Expenditure Distribution of Winter Visitor Groups to Montana from Idaho

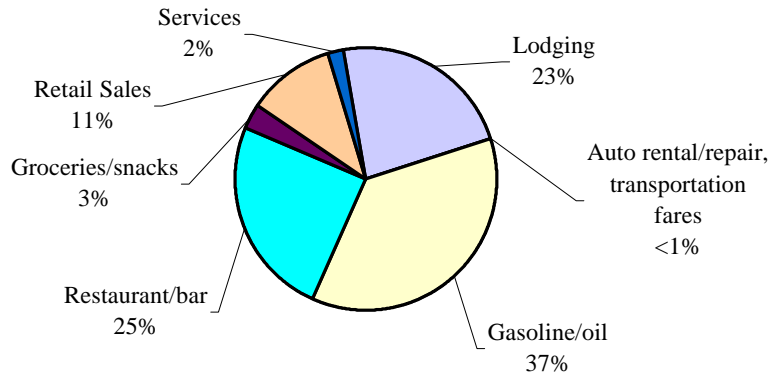


Table 2.10: Expenditures of Winter Groups in Montana from Idaho

Average Expenditures of Winter Visitor Groups to Montana from Idaho					
Percent of All Winter Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Winter Expenditures
11%	70,000	3.3	\$59	\$14 million	6%

Table 2.11: Most Frequent Group Types of Winter Groups in Montana from Idaho

	Group Type
#1	Alone
#2	Couple
#3	Family

Table 2.12: Most Frequent Primary Reasons for Trip of Winter Groups in Montana from Idaho

	Primary Reason for Trip
#1	Business
#2	Vacation/Recreation/Pleasure
#3	Visit Family/Friends



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Summer Visitor Groups to Montana from Wyoming

Summer visitor groups in Montana from Wyoming represented 5 percent of all summer nonresident groups to the state. They accounted for 2 percent of all summer nonresident expenditures, spent the largest portion of their money on retail sales, and stayed an average of 1.8 days (0 nights). Groups from Wyoming generally traveled as couples, with family, or alone, and visited Montana to visit family and friends, for vacation, or to shop.

Figure 2.5: Expenditure Distribution of Summer Visitor Groups to Montana from Wyoming

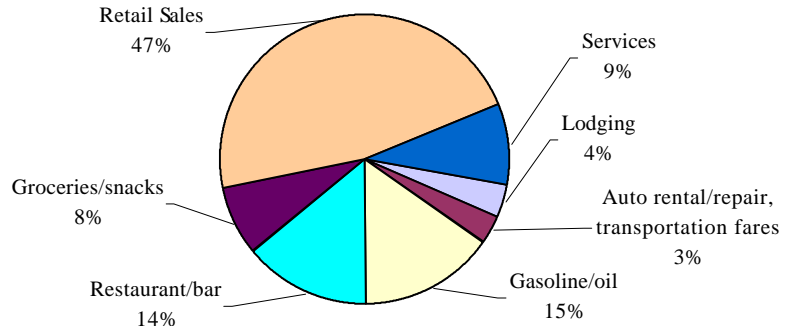


Table 2.13: Expenditures of Summer Groups in Montana from Wyoming

Average Expenditures of Summer Visitor Groups in Montana from Wyoming					
% of All Summer Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Summer Expenditures
5%	107,000	1.8	\$113	\$21 million	2%

Table 2.14: Most Frequent Group Types of Summer Groups in Montana from Wyoming

	Group Type
#1	Couple
#2	Family
#3	Alone

Table 2.15: Most Frequent Primary Reasons for Trip of Summer Groups in Montana from Wyoming

	Primary Reason for Trip
#1	Visit Family/Friends
#2	Vacation/Recreation/Pleasure
#3	Shopping



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Winter Visitor Groups to Montana from Wyoming

Winter visitor groups to Montana from Wyoming represented 9 percent of all winter nonresident groups to the state. They accounted for 6 percent of all winter nonresident expenditures, spent the largest portion of their money on retail sales, and stayed an average of 3.0 days (2 nights). Groups from Wyoming generally traveled alone, as couples, or with family, and visited Montana to pass through, for business, or to visit family and friends.

Figure 2.6: Expenditure Distribution of Winter Visitor Groups to Montana from Wyoming

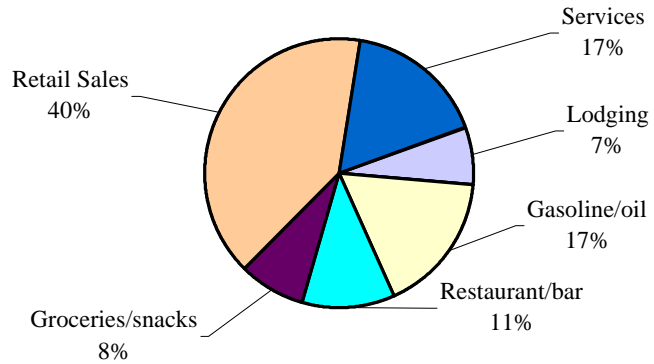


Table 2.16: Expenditures of Winter Groups in Montana from Wyoming

Average Expenditures of Winter Visitor Groups to Montana from Wyoming					
Percent of All Winter Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Winter Expenditures
9%	53,000	3.0	\$96	\$15 million	6%

Table 2.17: Most Frequent Group Types of Winter Groups in Montana from Wyoming

	Group Type
#1	Alone
#2	Couple
#3	Family

Table 2.18: Most Frequent Primary Reasons for Trip of Winter Groups in Montana from Wyoming

	Primary Reason for Trip
#1	Pass Through
#2	Business
#3	Visit Family/Friends



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Summer Visitor Groups to Montana from North Dakota

Summer visitor groups in Montana from North Dakota represented 4 percent of all summer nonresident groups to the state. They accounted for 2 percent of all summer nonresident expenditures, spent the largest portion of their money on gasoline/oil, and stayed an average of 3.2 days (2 nights). Groups from North Dakota generally traveled with family, alone, or as couples, and visited Montana to pass through, visit family and friends, or vacation.

Figure 2.7: Expenditure Distribution of Summer Visitor Groups to Montana from North Dakota

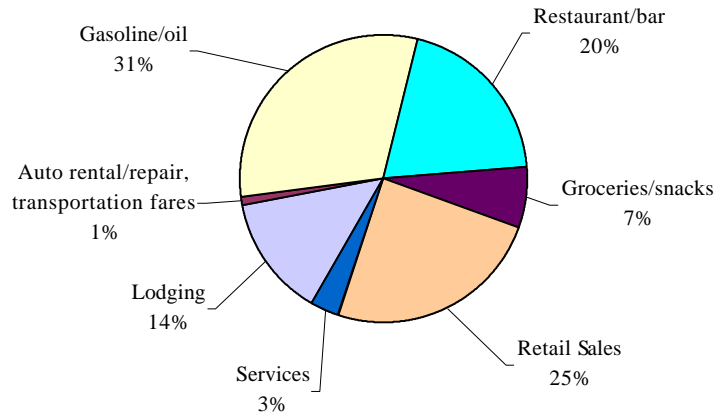


Table 2.19: Expenditures of Summer Groups in Montana from North Dakota

Average Expenditures of Summer Visitor Groups in Montana from North Dakota					
% of All Summer Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Summer Expenditures
4%	77,000	3.2	\$77	\$19 million	2%

Table 2.20: Most Frequent Group Types of Summer Groups in Montana from North Dakota

	Group Type
#1	Family
#2	Alone
#3	Couple

Table 2.21: Most Frequent Primary Reasons for Trip of Summer Groups in Montana from North Dakota

	Primary Reason for Trip
#1	Pass Through
#2	Visit Family/Friends
#3	Vacation/Recreation/Pleasure



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Winter Visitor Groups to Montana from North Dakota

Winter visitor groups to Montana from North Dakota represented 14 percent of all winter nonresident groups to the state. They accounted for 15 percent of all winter nonresident expenditures, spent the largest portion of their money on restaurant/bar, and stayed an average of 4.0 days (3 nights). Groups from North Dakota generally traveled with family, as couples, or alone, and visited Montana to pass through, for vacation, or for business.

Figure 2.8: Expenditure Distribution of Winter Visitor Groups to Montana from North Dakota

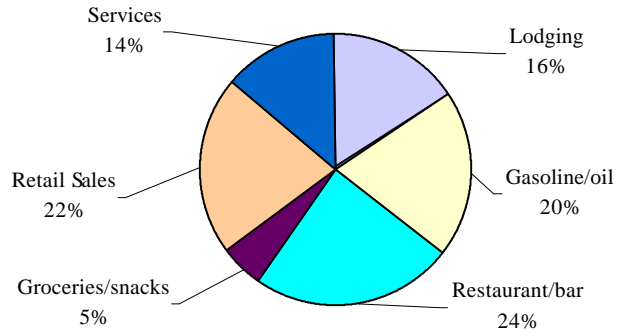


Table 2.22: Expenditures of Winter Groups in Montana from North Dakota

Average Expenditures of Winter Visitor Groups to Montana from North Dakota					
Percent of All Winter Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Winter Expenditures
14%	83,000	4.0	\$113 million	\$37 million	15%

Table 2.23: Most Frequent Group Types of Winter Groups in Montana from North Dakota

	Group Type
#1	Family
#2	Couple
#3	Alone

Table 2.24: Most Frequent Primary Reasons for Trip of Winter Groups in Montana from North Dakota

	Primary Reason for Trip
#1	Pass Through
#2	Vacation/Recreation/Pleasure
#3	Business



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Summer Visitor Groups to Montana from Minnesota

Summer visitor groups in Montana from Minnesota represented 4 percent of all summer nonresident groups to the state. They accounted for 4 percent of all summer nonresident expenditures, spent the largest portion of their money on gasoline/oil, and stayed an average of 4.5 days (3 nights). Groups from Minnesota generally traveled with family, as couples, or alone, and visited Montana for vacation, to pass through, or to visit family and friends.

Figure 2.9: Expenditure Distribution of Summer Visitor Groups to Montana from Minnesota

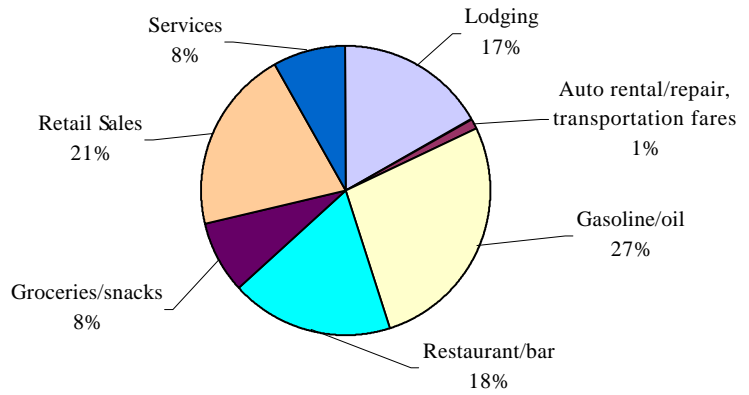


Table 2.25: Expenditures of Summer Groups in Montana from Minnesota

Average Expenditures of Summer Visitor Groups in Montana from Minnesota					
% of All Summer Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Summer Expenditures
4%	92,000	4.5	\$87	\$36 million	4%

Table 2.26: Most Frequent Group Types of Summer Groups in Montana from Minnesota

	Group Type
#1	Family
#2	Couple
#3	Alone

Table 2.27: Most Frequent Primary Reasons for Trip of Summer Groups in Montana from Minnesota

	Primary Reason for Trip
#1	Vacation/Recreation/Pleasure
#2	Pass Through
#3	Visit Family/Friends



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Winter Visitor Groups to Montana from Minnesota

Winter visitor groups to Montana from Minnesota represented 6 percent of all winter nonresident groups to the state. They accounted for 12 percent of all winter nonresident expenditures, spent the largest portion of their money on lodging, and stayed an average of 5.8 days (4 nights). Groups from Minnesota generally traveled with friends, as couples, or with family, and visited Montana for vacation, to pass through, or to visit family and friends.

Figure 2.10: Expenditure Distribution of Winter Visitor Groups to Montana from Minnesota

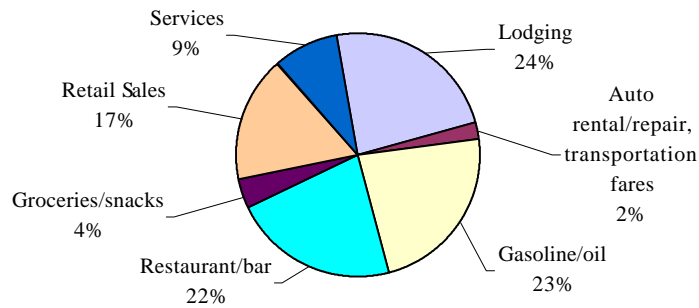


Table 2.28: Expenditures of Winter Groups in Montana from Minnesota

Average Expenditures of Winter Visitor Groups to Montana from Minnesota					
Percent of All Winter Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Winter Expenditures
6%	35,000	5.8	\$142 million	\$29 million	12%

Table 2.29: Most Frequent Group Types of Winter Groups in Montana from Minnesota

	Group Type
#1	Friends
#2	Couple
#3	Family

Table 2.30: Most Frequent Primary Reasons for Trip of Winter Groups in Montana from Minnesota

	Primary Reason for Trip
#1	Vacation/Recreation/Pleasure
#2	Pass Through
#3	Visit Family/Friends



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Summer Visitor Groups to Montana from California

Summer visitor groups in Montana from California represented 9 percent of all summer nonresident groups to the state. They accounted for 12 percent of all summer nonresident expenditures, spent the largest portion of their money on retail items, and stayed an average of 5.6 days (4 nights). Groups from California generally traveled as couples, with family, or alone, and visited Montana for vacation, to visit family and friends, or to pass through.

Figure 2.11: Expenditure Distribution of Summer Visitor Groups to Montana from California

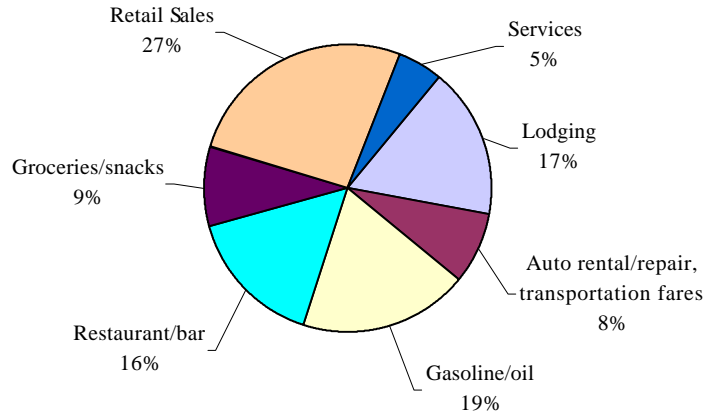


Table 2.31: Expenditures of Summer Groups in Montana from California

Average Expenditures of Summer Visitor Groups in Montana from California					
% of All Summer Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Summer Expenditures
9%	188,000	5.6	\$108	\$115 million	12%

Table 2.32: Most Frequent Group Types of Summer Groups in Montana from California

	Group Type
#1	Couple
#2	Family
#3	Alone

Table 2.33: Most Frequent Primary Reasons for Trip of Summer Groups in Montana from California

	Primary Reason for Trip
#1	Vacation/Recreation/Pleasure
#2	Visit Family/Friends
#3	Pass Through



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Summer Visitor Groups to Montana from Colorado

Summer visitor groups in Montana from Colorado represented 5 percent of all summer nonresident groups to the state. They accounted for 5 percent of all summer nonresident expenditures, spent the largest portion of their money on gasoline/oil, and stayed an average of 5.4 days (4 nights). Groups from Colorado generally traveled with family, as couples, or alone, and visited Montana for vacation, to visit family and friends, or to pass through.

Figure 2.12: Expenditure Distribution of Summer Visitor Groups to Montana from Colorado

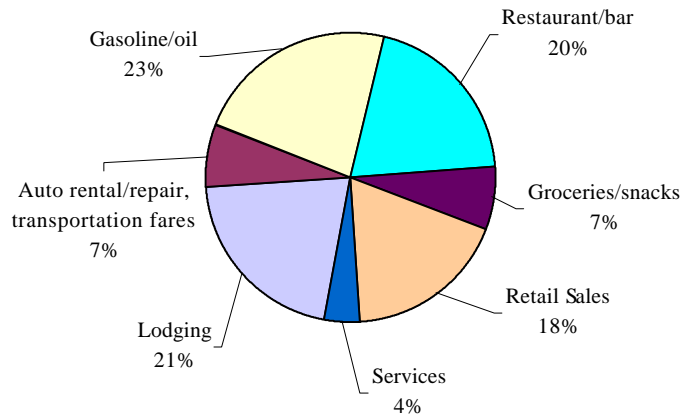


Table 2.34: Expenditures of Summer Groups in Montana from Colorado

Average Expenditures of Summer Visitor Groups in Montana from Colorado					
% of All Summer Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Summer Expenditures
5%	103,000	5.4	\$94	\$52 million	5%

Table 2.35: Most Frequent Group Types of Summer Groups in Montana from Colorado

	Group Type
#1	Family
#2	Couple
#3	Alone

Table 2.36: Most Frequent Primary Reasons for Trip of Summer Groups in Montana from Colorado

	Primary Reason for Trip
#1	Vacation/Recreation/Pleasure
#2	Visit Family/Friends
#3	Pass Through



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Winter Visitor Groups to Montana from Alberta

Winter visitor groups to Montana from Alberta represented 9 percent of all winter nonresident groups to the state. They accounted for 2 percent of all winter nonresident expenditures, spent the largest portion of their money on gasoline/oil, and stayed an average of 2.0 days (1 night). Groups from Alberta generally traveled as couples, alone, or with friends, and visited Montana to pass through, for vacation, or for business.

Figure 2.13: Expenditure Distribution of Winter Visitor Groups to Montana from Alberta

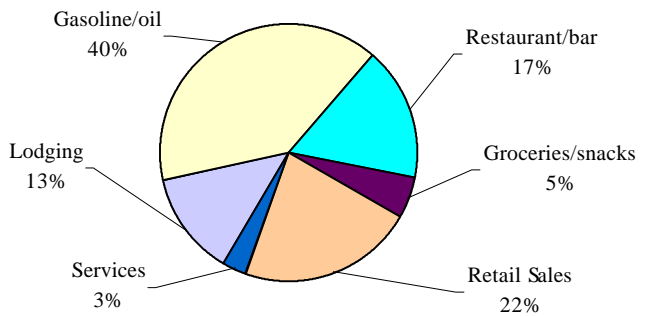


Table 2.37: Expenditures of Winter Groups in Montana from Alberta

Average Expenditures of Winter Visitor Groups to Montana from Alberta					
Percent of All Winter Traveler Groups	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Winter Expenditures
9%	54,000	2.0	\$54	\$6 million	2%

Table 2.38: Most Frequent Group Types of Winter Groups in Montana from Alberta

	Group Type
#1	Couple
#2	Alone
#3	Friends

Table 2.39: Most Frequent Primary Reasons for Trip of Winter Groups in Montana from Alberta

	Primary Reason for Trip
#1	Pass Through
#2	Vacation/Recreation/Pleasure
#3	Business



There is overlap among market segments discussed in this report (for example, skiers may also visit family). Therefore, *the economic figures presented are not additive between sections!*

Section 4

Recreation Markets

Recreation markets, as presented here, focus on particular activities that attracted visitors to Montana. Fishing (summer), downhill skiing/snowboarding and snowmobiling (winter) are key recreation markets.

The figures presented here do not represent the entire population of visitors who participated in fishing, downhill skiing/snowboarding, or snowmobiling. **They only represent those groups who indicated vacation as *one reason* for visiting Montana and these activities as their *primary attraction* to Montana.** For example, 13 percent of summer travel groups engaged in fishing, but only 6 percent indicated that it was their primary attraction. Because the figures presented in this section only represent groups primarily attracted for the activities described, they may not match figures published about these travel groups by other sources. If comparing to other reports, the reader should be aware of who is included in the figures being presented.

Summer Nonresident Visitor Groups Primarily Attracted to Montana for Fishing

Summer groups primarily attracted to Montana for fishing represented 6 percent of all summer nonresident groups vacationing in the state. They accounted for 7% percent of all summer nonresident expenditures, spent the largest portion of their money on retail sales, and stayed an average of 6.8 days (5 nights). Groups here to fish generally traveled as couples, with family, or alone, came to Montana from California, Washington, Utah, or Idaho, and were on vacation, visiting family and friends, or on business.

Figure 3.1: Expenditure Distribution of Summer Visitor Groups Primarily Attracted to Montana for Fishing

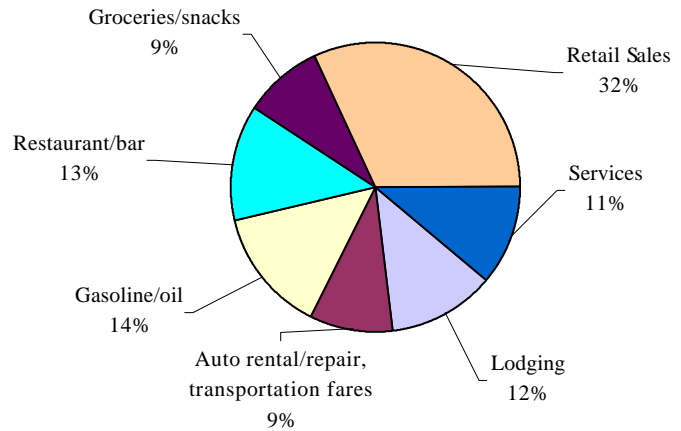


Table 3.1: Expenditures of Summer Groups Primarily Attracted to Montana for Fishing

Average Expenditures of <i>Summer Visitor Groups Primarily Attracted to Montana for Fishing</i>					
% of Summer Vacationers	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Summer Expenditures
6%	68,000	6.8	\$139	\$64 million	7%

Table 3.2: Most Frequent Group Types of Summer Groups Primarily Attracted to MT to Fish

	Group Type
#1	Couple
#2	Alone
#3	Friends

Table 3.3: Most Frequent Places of Residence of Summer Groups Primarily Attracted to MT to Fish

	Place of Residence
#1	California
#2	Washington
#3	Utah Idaho

Table 3.4: Most Frequent Primary Reasons for Trip of Summer Groups Primarily Attracted to MT to Fish

	Primary Reason for Trip
#1	Vacation/Recreation/ Pleasure
#2	Visit Family/Friends
#3	Business



There is overlap among market segments discussed in this report (for example, skiers may also visit family). For this reason, *the economic figures presented are not additive between sections!*

Winter Nonresident Visitor Groups Primarily Attracted to Montana for Downhill Skiing/Snowboarding

Winter groups primarily attracted to Montana for downhill skiing/snowboarding represented 22 percent of all winter nonresident groups vacationing in the state. They accounted for 9 percent of all winter nonresident expenditures, spent the largest portion of their money on lodging, and stayed an average of 5.9 days (4 nights). Groups here to downhill ski/snowboard generally traveled with family, as couples, or with friends, came from North Dakota, Minnesota, or Washington, and were on vacation, visiting family and friends, or on business.

Figure 3.2: Expenditure Distribution of Winter Visitor Groups Primarily Attracted to Montana for Downhill Skiing/Snowboarding

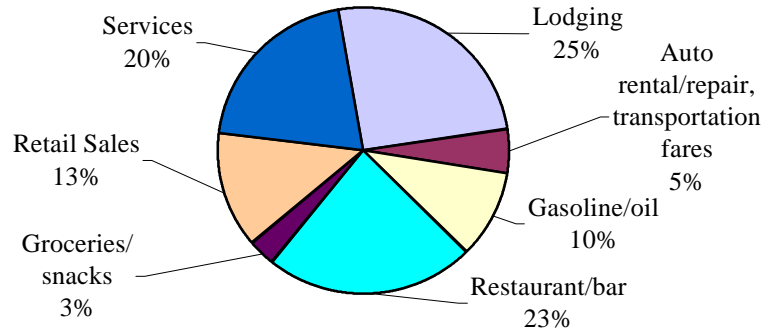


Table 3.5: Expenditures of Winter Groups Primarily Attracted to Montana for Downhill Skiing/Snowboarding.

Average Expenditures of Winter Visitor Groups Primarily Attracted to Montana for Downhill Skiing/Snowboarding					
Percent of Vacationers	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Winter Expenditures
22%	27,000	5.9	\$134	\$21 million	9%

Table 3.6: Most Frequent Group Types of Winter Groups Primarily Attracted to MT to Downhill Ski/Snowboard

	Group Type
#1	Family
#2	Couple
#3	Friends

Table 3.7: Most Frequent Places of Residence of Winter Groups Primarily Attracted to MT to Downhill Ski/Snowboard

	Place of Residence
#1	North Dakota
#2	Minnesota
#3	Washington

Table 3.8: Most Frequent Primary Reasons for Trip of Winter Groups Primarily Attracted to MT to Downhill Ski/Snowboard

	Primary Reason for Trip
#1	Vacation/Recreation/Pleasure
#2	Visit Family/Friends
#3	Business



There is overlap among market segments discussed in this report (for example, skiers may also visit family). For this reason, *the economic figures presented are not additive between sections!*

Winter Nonresident Visitor Groups Primarily Attracted to Montana for Snowmobiling

Winter groups primarily attracted to Montana for snowmobiling represented 20 percent of all winter nonresident groups vacationing in the state. They accounted for 11 percent of all winter nonresident expenditures, spent the largest portion of their money on restaurants/bars, and stayed an average of 6 days (5 nights). Groups here to snowmobile generally traveled as friends, family and friends, or as couples, came from Minnesota, Washington, Idaho, or Utah, and were on vacation, visiting family and friends, or passing through the state.

Figure 3.3: Expenditure Distribution of Winter Visitor Groups Primarily Attracted to Montana for Snowmobiling

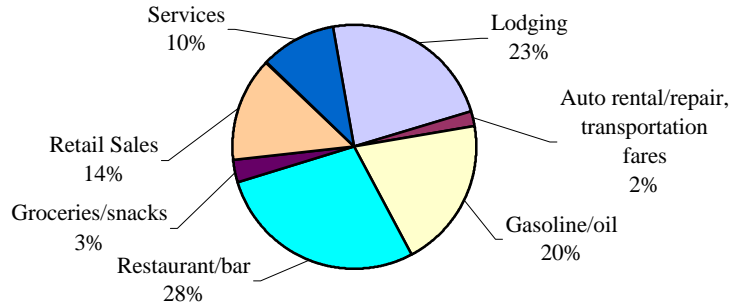


Table 3.9: Expenditures of Winter Groups Primarily Attracted to Montana for Snowmobiling.

Average Expenditures of Winter Visitor Groups Primarily Attracted to Montana for Snowmobiling					
Percent of Vacationers	# of groups	Average Length of Stay (days)	Average Daily Group Expenditures	Total Expenditures	% of All Winter Expenditures
20%	24,000	6.0	\$188	\$27 million	11%

Table 3.10: Most Frequent Group Types of Winter Groups Primarily Attracted to MT to Snowmobile

	Group Type
#1	Friends
#2	Family and Friends
#3	Couple

Table 3.11: Most Frequent Places of Residence of Winter Groups Primarily Attracted to MT to Snowmobile

	Place of Residence
#1	Minnesota
#2	Washington
#3	Idaho Utah

Table 3.12: Most Frequent Primary Reasons for Trip of Winter Groups Primarily Attracted to MT to Snowmobile

	Primary Reason for Trip
#1	Vacation/Recreation/ Pleasure
#2	Visit Family/Friends
#3	Pass Through



There is overlap among market segments discussed in this report (for example, skiers may also visit family). For this reason, *the economic figures presented are not additive between sections!*

Section 5

Marketing Response

This section examines travel groups that are repeat visitors to Montana, travel groups who used an information source, and the information source found to be most useful (if one was used). Repeat travel groups to the state would have prior knowledge of Montana and, possibly, the places they wish to see and activities they would like to participate in. Sources of information used by nonresident travel groups gives insight into where marketing should be focused and what percentage of the nonresident population that can be expected to see such promotional efforts.

Some points of interest:

- ◆ Of all summer groups included in this report, only about 30 percent or less of any segment had not been to Montana before their 1996 summer trip.
- ◆ Business groups were least likely of all summer groups to use an information source.
- ◆ Only about one-half of travel groups to the state (often fewer) for many summer group types used an information source.
- ◆ Of all winter groups, 85 percent or more of any segment were repeat visitors.
- ◆ Two-thirds or less of any segment used an information source.
- ◆ Winter groups in Montana to shop were the least likely of all winter groups to use an information source.
- ◆ The most useful sources of information used by nonresident visitors were automobile clubs, guide books, travel agents, private businesses, and "other" sources (see Appendix A).

Summer Group Responsiveness to Marketing

Table 4.1: Responsiveness to Marketing by Primary Reason for Summer Trip to Montana.

Primary Reason for Trip to Montana	Percent of Groups Who are Repeat Visitors to Montana	Percent of Groups Who Used an Information Source	Most Useful Information Source (if one was used)
Passing Through	78%	56%	AAA
Business	89%	36%	AAA
Vacation/Recreation/Pleasure	69%	74%	AAA
Visit Family/Friends	92%	39%	AAA
Shopping	95%	38%	AAA
Meeting/Convention	82%	66%	AAA

Table 4.2: Responsiveness to Marketing by Summer Trip Visitor Group Residence.

Summer Visitor Groups Residence	Percent of Groups Who are Repeat Visitors to Montana	Percent of Groups Who Used an Information Source	Most Useful Information Source (if one was used)
Washington	91%	48%	AAA
North Dakota	99%	44%	AAA
Idaho	92%	42%	AAA
Wyoming	99%	29%	Guide Book
California	75%	69%	AAA
Minnesota	83%	67%	AAA
Colorado	84%	50%	AAA

* See Appendix A for written response.

Table 4.3: Responsiveness to Marketing by Primary Summer Attraction to Montana.

Primary Summer Attraction to Montana	Percent of Groups Who are Repeat Visitors to Montana	Percent of Groups Who Used an Information Source	Most Useful Information Source (if one was used)
Fishing	94%	45%	AAA

Travel groups primarily in Montana on business or to visit family and friends will likely not respond to traditional marketing of Montana as a vacation spot. For these groups, their attraction (business and family/friends) is here whether promoted or not. Additionally, it seems that groups primarily passing through Montana or here for a meeting or convention would not be very likely to respond to marketing. The reasoning is that groups passing through the state are here for that reason, but about half of them use information sources to explore what they could do in Montana since their travel route requires them to be here anyway. Likewise, meeting- and convention-goers are typically in Montana because the convention they are attending has been scheduled in the state. Three-fourths of these visitor groups use information to learn about opportunities in the area of the convention, but they do not actually plan their trip to Montana due to information sources or promotional materials (it is likely, however, that some type of promotion was necessary to get the event schedule in Montana). Therefore, it seems logical that groups on vacation would be the most likely to respond to marketing efforts. Of all summer vacation groups, 69 percent are repeat visitors and likely have some sense of activities and places they desire. Seventy-four percent of these groups used an information source for planning their trip, which is the highest level of use by any group analyzed here. It is important to notice that the most useful information sources to summer visitor groups were AAA and guide books, which are produced by private enterprise and not by state promotional agencies.

Winter Group Responsiveness to Marketing

Table 4.4: Responsiveness to Marketing by Primary Reason for Winter Trip to Montana.

Primary Reason for Trip to Montana	Percent of Groups Who are Repeat Visitors to Montana	Percent of Groups Who Used an Information Source	Most Useful Information Source (if one was used)
Passing Through	95%	53%	Auto Club*
Business	92%	43%	Travel Agent
Vacation/Recreation/ Pleasure	89%	56%	Other**
Visit Family/Friends	92%	45%	Other**
Shopping	100%	29%	Travel Agent
Meeting/Convention	95%	61%	Private Business

* Such as AAA.

** See Appendix A for written response.

Table 4.5: Responsiveness to Marketing by Winter Trip Visitor Group Residence.

Winter Visitor Groups Residence	Percent of Groups Who are Repeat Visitors to Montana	Percent of Groups Who Used an Information Source	Most Useful Information Source (if one was used)
Washington	95%	47%	Auto Club*
North Dakota	96%	38%	Other**
Idaho	100%	34%	Auto Club*
Wyoming	98%	45%	Private Businesses
Alberta	100%	47%	Auto Club*
Minnesota	91%	67%	Other**

* Such as AAA.

** See Appendix A for written response.

Table 4.6: Responsiveness to Marketing by Primary Winter Attraction to Montana.

Primary Winter Attraction to Montana	Percent of Groups Who are Repeat Visitors to Montana	Percent of Groups Who Used an Information Source	Most Useful Information Source (if one was used)
Snowmobiling	95%	66%	Other*
Downhill Skiing/ Snowboarding	85%	60%	Other*

* See Appendix A for written response.

Winter visitor groups to Montana were very likely to be repeat visitors to Montana and therefore less likely to use an information source overall. As with summer visitor groups, winter visitors found private enterprises to be more useful as sources of information than state promotional materials.

Appendix A

"Other" Written Responses

Winter "Other" Written Responses

"Other" Purposes of Trip to Montana

Birthday
Buying Montana property
Court
Funeral
Job interview/Job search
Mail gifts/Post Office
Moving out/Relocation
Pick up family/friend
Pick up wrecked car
Visit college campus
Wedding

"Other" Attractions to Montana

Fishing
Friendly people
Gambling
Gold Prospecting
Guest Ranch
Hiking
Hot Springs
Own Property
Photography
Recreational activity
Snow shoeing
Special Event
Variety of Landscape
Wilderness

"Other" Types of Accommodations

Private motel
Travel trailer
US Forest Service Cabin

"Other" Information Sources Used for Planning Trip

Family/Friends
Fish and Wildlife
Maps/Atlas

Montana Telephone Association
Newspaper/Magazine
Trade Shows
TV Advertisements
University
USA Center in Belgium
Visitor Information

"Other" Activities

Biking
Camping in Parking Lot
Dog Sledding
Golf
Horseback Riding
Ice Skating
Motorcycling
Movie/Theater
Photography
Sightseeing
Snow Play
Square dancing
Target Practice
Visit taverns/Eating

Summer "Other" Written Responses

“Other” Purposes of Trip to Montana

Do laundry
 Education (visiting college, internship, orientation, graduation)
 Family events (weddings, funerals, reunions, anniversaries, etc.)
 Montana traffic laws (lack of speed limit)
 Previous resident of Montana
 Property owner in Montana
 Property purchase in Montana
 Relocation, moving to Montana
 Repairs (car, equipment, home)
 Skiing
 Transportation (dropping at airport, boarding train)
 Visit gravesite

“Other” Specific Attractions to Montana

Cities
 Exploring
 Floating/canoeing trip
 Fossils
 Gambling, casinos
 Geology
 Geothermal areas
 Highways, roadways
 Home state/town
 Little Big Horn/Custer Battlefield
 Location
 Mining
 Montana traffic laws
 Museums
 Old mansions
 Other outdoor recreation
 Radon mine
 Ranch experience
 Scenery, beauty
 Sightseeing
 Square dancing

“Other” Special Events as Attractions to Montana

Community activities
 Festivals
 Sporting Events

“Other” Types of Accommodations

Bed and Breakfast
 Hostel
 Malstrom Air Force Base
 Parking lot
 Private facility
 Rented house/cabin
 School
 Travelers vacation home, cabin, or property

“Other” Activities

Family/Friend events
 Horseback riding
 Hunting/scouting
 Miscellaneous recreation activities
 Movie/Imax movie
 Riding moped
 Riding motorcycle
 Sightseeing, scenic driving
 Tours
 Walking/exercising

“Other” Information Sources Used While in Montana

Map
 National Park station
 Other facility
 Other people
 Service facility
 Travel atlas
 Travel book
 Visitor center
 Written materials

Appendix B

Survey Instruments

Winter Survey Instrument

Summer Survey Instrument

Appendix C

Front-End Intercept Questions

Winter Front-End Questions

Summer Front-End Questions

